Advocare Provider Portal Administrator Actions

On behalf of the State and all Hoosiers participating in the State of Indiana's Medicaid Waiver program, your efforts to increase communication and improve quality are greatly appreciated.

Using Advocare's Provider Portal is easy! This guide outlines the simple steps related to the following:

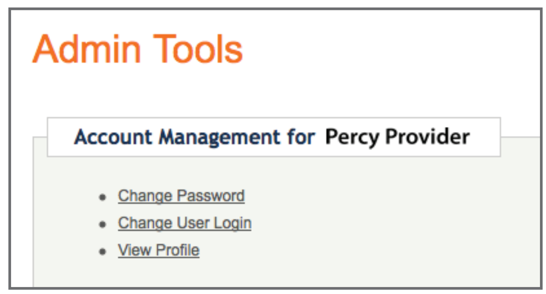
- Providing access to/add/remove/change authorized users
- How to change permission levels for/deactivate authorized users
- What features are included in the Advocare's Provider Portal
- How to attach/associate an authorized user to a waiver participant
- What information is available to providers
- How to request updates to a waiver participant's information

❑ *Providing access to/add/remove/change authorized user*

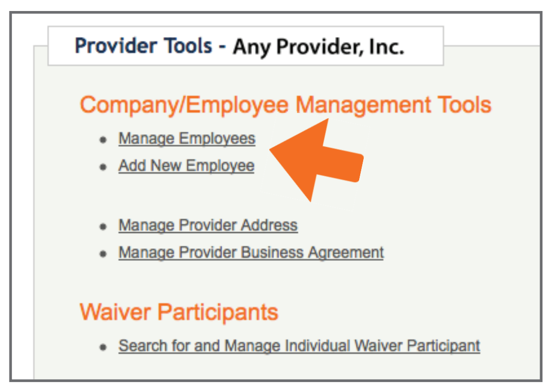
Individuals with administrative permission have the capability to provide access to Advocare to other users within their organization. Additionally, users with administrative-level permission can remove or change authorization for users, depending upon the needs of the organization and the admin's internal responsibilities. Upon log in to Advocare, click **Admin Tools**, located in the top right-hand corner of the screen.

The information displayed here varies, depending on the user's permission/role, and may include one or both of the following sections:

Account Management:
The *Account Management* area provides basic account management functions for each user, including changing their password or email address, and viewing their profile.



Profile Tools:
The information displayed within the **Provider Tools** area varies, depending upon the user's permission/role. For individuals with minimal permission, nothing is shown in this area. Individuals with administrative permissions manage employees who currently have permission to access Advocare, add additional employees to their Advocare account, manage their organization's provider address and Business Associate Agreement, and search for individual waiver participants.



Please note: For information and instructions on signing the Business Associate Agreement (BAA), review the PDF document, "Advocare Training, Processes, and Procedures — Provider Portal Welcome".

To view a printable version of your signed BAA, click the view link and print.

❑ *Providing Access to Authorized Users*

Advocare enables individuals within your organization who are supporting waiver participants to view information specific to those whom they support. It is the responsibility of the participating provider organization to:

1) determine which individuals within your organization would benefit from access to Advocare for either information or training purposes

2) add and maintain accounts within Advocare for those individuals for whom access is determined beneficial, including permissions/roles.

Adding individuals to Advocare is easy! As a user with administrative-level permission, you have permission to provide access to Advocare to other individuals from your organization, or "add" employees to your Advocare account.

To add authorized users from your organization to Advocare, click Add New Employee, located under Company/Employee Management Tools within the Admin Tools section. Adding users is done in three quick steps:

1. Complete the fields, ensuring all information is correctly entered, with particular attention to their name, email, date of birth, and social security number. The items marked with the orange asterisk (*) are required.

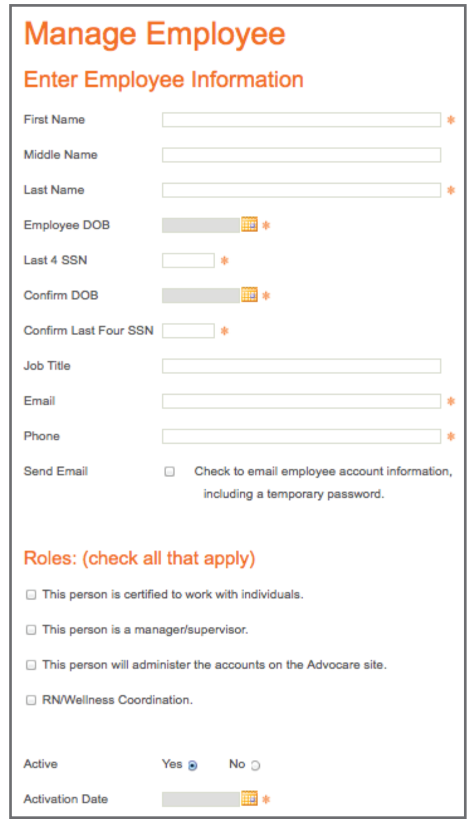
   Please note: The Send Email box must be selected in order for the system to send the login information via email.

2. Select the appropriate role(s), which will determine the permission level and information available to the individual upon logging in to Advocare.

   Please note: Any employee needing to be assigned to a waiver participant (where the waiver participant will be listed in their dropdown under 'My Individuals') **MUST** have 'This person is certified to work with individuals' permission, in addition to any other roles.

   Additionally, RNs or LPNs working with the Wellness Coordination service must have the 'RN/Wellness Coordination' permission, in addition to 'This person is certified to work with individuals', in order to have individuals assigned to him or her.

3. Select the date this individual should have be 'active' within Advocare, which will be the first date he or she can access Advocare. Click Add.



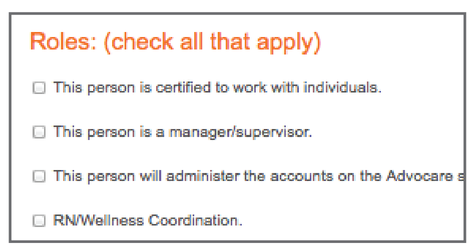
This process adds this individual to the list of employees who are currently active (have Advocare access) in the **Manage Employees** area, accessible under 'Company/Employee Management Tools' within the Admin Tools section.

❑ *Changing Permission Level/Deactivating Users*

To manage an employee's access, including roles (permission) and activation/deactivation, click Edit to the right of the employee for whom you wish to make a change, as listed in Manage Employees view.

To remove access to Advocare (deactivate) an employee, click 'No' as the selection for the 'Active' option and select a Deactivation Date. Deactivation is immediate as of the date selected. Individuals may be reactivated at any time by reselecting 'Yes' as the option for 'Active' and selecting a new activation date.

To change a user's permission level, change the role currently selected, or click the checkbox to add another role to increase the user's permission level. Changes to the individual's role are immediate when a change is made and 'Save' is selected.

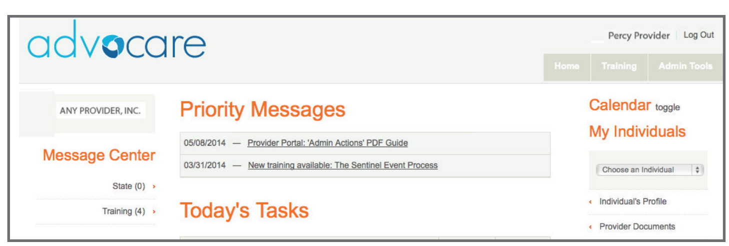


❑ *Provider Portal Features*

For all users, upon logging in, the provider's Home page is shown (*below*). (Click the **Home** orange button located at the top right on the top-right corner of the screen to access.) Here's a quick tour of the features available to providers:

Message Center:

Located on the top of the left-hand side of the provider's Home page, Advocare's Message Center provides direct communication from the State of Indiana or from Advocare's Training Department. Messages may be specific to



an individual user, individual group (based on role or permission level), individual company, or global to all users in nature. Unread messages are highlighted in **bold**, and priority messages are noted.

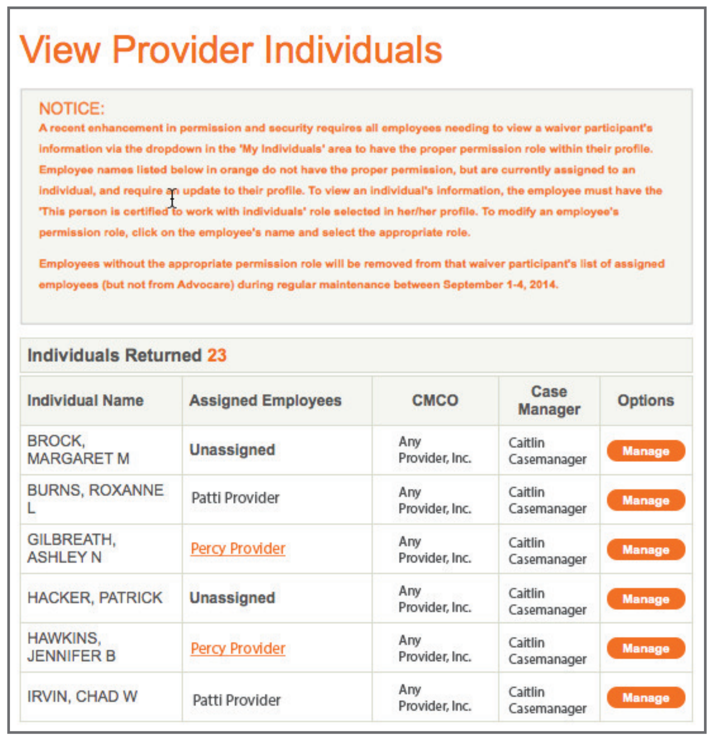
My Work:

My Work offers users interactive guidance on deadlines, requirements, or activities of note for the individual user, based on their role, the State's requirements, or their organization's requirements. The Provider Activities area of the 'My Work' section will also be the primary spot for future additional enhancements to Advocare's Provider Portal.

- To ensure easy access to these functions, all 'My Work' features are also currently reflected in the 'Today's Tasks' area of the 'Home' page.

Provider Activities: For those with administrative permission, a number of different features, related to the management of employees and employees assigned to specific waiver participants currently supported by the provider, may be viewed here. As administrative capabilities grow within Advocare, additional features will be added to this area. Currently, the following components are accessible:

Individuals Assigned Non-certified Employees: A recent enhancement in permission and securities requires all employees needing to view a waiver participant's information via the dropdown in the 'My Individuals' area to have the proper permission role within their profile.



The 'Individuals Assigned Non-certified Employees' function provides a quick view of employees who do not have the proper permission level, but are currently assigned to a waiver participant. Employee names listed in orange on the View Provider Individuals screen require an update to their profile.

To view an individual's information, the employee must have the 'This person is certified to work with individuals' role selected in his/her profile. To modify an employee's permission role, click on the employee's name and select the appropriate role. Click 'Manage' to manage the waiver participant's information.

Individuals Needing Provider Employee Assigned: The second function within the 'Provider Activities' area of the 'My Work' section, 'Individuals Needing Provider Employee Assigned' provides easy access to waiver participants needing an employee assigned to him or her. For more information on this function, see '*Attaching/Associating Authorized Users to a Waiver Participant*,' below.

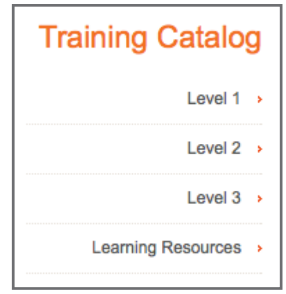
My Support:

The My Support section of the Home page is comprised of two components: Training and Contact.

Contact: An easy way to contact Advocare regarding technology questions and other Advocare-related issues. This form should not be used to inquire about a waiver participant's information or other waiver-related topics. Please continue to contact the case manager with questions regarding the individual's information or other waiver-related issues.

Training: Within Advocare's Training Center, the State of Indiana offer access for providers to State-approved training components, resources, and information. The Training home page, also accessible via the 'Training' button on the screen's top right, reflects the number of training hours accomplished by the user in the ***Training Status*** area, as well as the ***Training Catalog*** components, and access to ***External Training*** events.

The ***Training Status*** area's 'Hours Earned Total' (*at right*) reflects the number of training hours accomplished by the user during the current calendar year. Training hours are accomplished by completing the training modules available within the Training Catalog and passing the associated assessments. (Most assessment require an 85% for passing; other require 100% to receive credit.) 'View Training Credits' breaks down training efforts within the current calendar year, as well as efforts in the past years, if available.

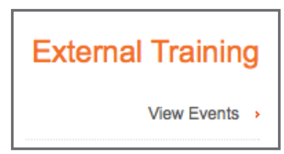


The ***Training Catalog*** area provides access to three levels of State-approved training components. To view a training component, simply click a level, then click on the title of the desired training (*at right*). Here you'll find a description of the selected training and the related credit hours, any related deadline (all training credit tabulations end annually on 12/15), a link to view the webinar, and a link to take the related assessment, if available. (Non-credit trainings do not include assessments.)

Users can access each training component as frequently as desired, but may only receive credit for each "for credit" component once per calendar year.

A user's training credits will transfer with an individual, should they separate from one State-approved provider to be hired by another State-approved provider, as long as the time of separation is less than six calendar months. (The time of separation is defined as the time access to Advocare is removed by the separating provider and granted by the new provider.)

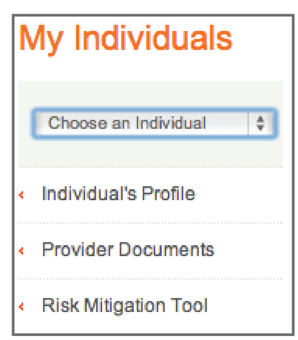
Learning Resources: For additional support on a number of training and related subjects, the 'Learning Resources' area is an excellent reference repository that includes documents, links, and a variety of other resources.



External Training provides access to training components and events not sponsored by the State of Indiana. Events are submitted to the State of Indiana, then approved or denied based on the content and applicability to those supporting Hoosier waiver participants. After attending an approved event, Advocare users can submit proof of attendance to receive credit. More detailed information on the 'External Training' area is available in the Training Processes and Procedures Update PDF, "Training Update: External Training", available in the 'Learning Resources' area of the Training Catalog.

My Individuals:

Located on the top of the right-hand side of the provider portal's Home page, My Individuals reflects three areas of information available specific to an individual supported by the Advocare user currently logged in to the system. The three areas are Individual's Profile; Provider Documents; and Risk Mitigation Tool. A few notes regarding the information here:



- Except for users in your organization with administrative permission, users can only see the information for those individuals for whom they provide support in order to ensure HIPAA compliance.
- Users MUST have the permission level 'This person is certified to work with individuals' selected (in addition to any other permission roles, as appropriate), and be assigned or attached to the waiver participant, before the individual will be shown in the 'My Individuals' dropdown option.
- The user must select the specific individual from the 'Choose an Individual' dropdown; only information specific to that individual will be displayed. Only one individual's information may be displayed at a time.
- Users must be associated with or 'attached' to a waiver participant by someone in your organization with administration privileges, prior to any information appearing in these areas or the individual's name appearing in the 'Choose an Individual' dropdown for that employee.

- Once a signed Business Associate Agreement is on file with Advocare, your provider organization can access waiver participants' information and 'attach' or associate a provider employee/employees to that individual.
- If an individual has Wellness Coordination as a service, users who have the proper permission will see Wellness Coordination as a fourth option in this area.

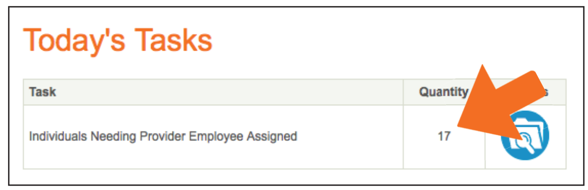
  Please note: Users involved in Wellness Coordination (including reviewing data entered by the Provider's RN) must have two permissions selected in their profile in order to see the Wellness Coordination information: 'This person is certified to work with individuals' and 'RN/Wellness Coordination'.

❑ *Attaching/Associating Authorized Users to a Waiver Participant*

Advocare offers to two easy ways to 'attach' or assign an authorized users (employees) within your organization to a specific waiver participant. Both processes result in the same action: ensuring the direct support professional can view the available information for the waiver participant to whom they have been attached. The two methods for attaching are as follows:

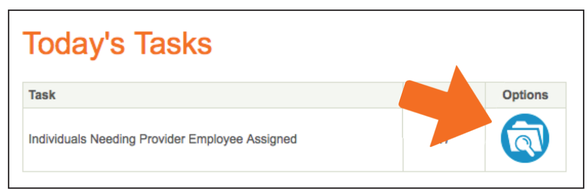
Individuals Needing Provider Employee Assigned

For Advocare users with manager- or administrative-level permission, a task titled Individuals Needing Provider Employee Assigned will show in the Today's Tasks area of the Home page (also available via the Provider Activities area of the My Work section).

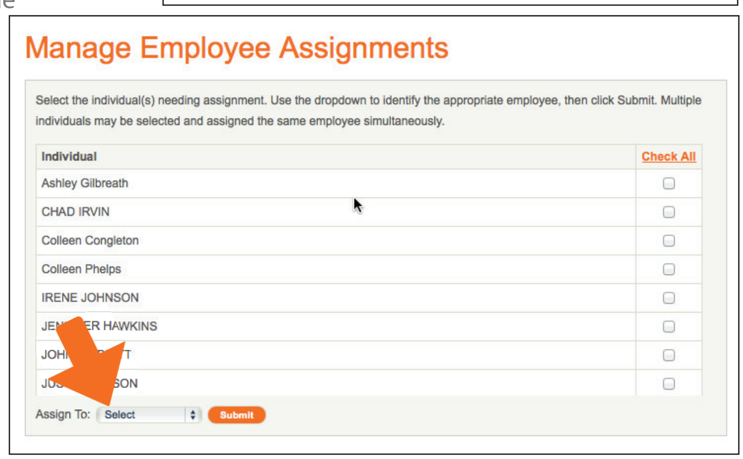


Here, the number of waiver participants needing an employee assigned to him or her is noted in the 'Quantity column. (This list reflects only those waiver participants without any employees currently assigned to him or her, such as those new to your organization, not those who have at least one employee assigned. To add employees to those with at least one assigned employee, see 'Provider Employee Setup for a Specific Waiver Participant', below.)

This option allows the user to assign either an individual employee to a single waiver participant, or to assign an employee to several or all of the individuals listed on the Manage Employee Assignments screen in a few simple steps:



1. From the Home page, under Today's Tasks, click the blue icon in the 'Options' column to view the list of waiver participants needing an employee assigned.
2. To assign, select the individual(s) needing assignment, then use the 'Assign To' dropdown to identify the appropriate employee.
3. Click Submit to confirm your selections. ***Multiple individuals may be selected and assigned the same employee simultaneously.***



The 'Individuals Needing Provider Employee Assigned' option in the 'Today's Tasks' area will also reflect waiver participants for whom the only employee attached to them has been made inactive, via the actions of an admin within your company. Those waiver participants will need a new direct support professional assigned, and will appear on this list to ensure all waiver participants supported by your organization have at least one employee/direct support professional assigned to him or her. This process occurs automatically upon the date selected as the 'Deactivate' date in the former employee's profile within the 'Manage Employees' area of the Admin Tools section. For more information on deactivation, see 'Changing Permission Level/Deactivating Users' earlier in this document.

Those same individuals will be shown in the 'Provider Employee Setup' area in the 'Individual's Profile' area, where one or more employees can be assigned (or removed) to a waiver participant, as outlined below.

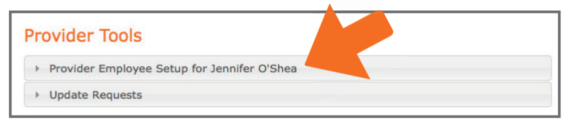
Provider Employee Setup for a Specific Waiver Participant

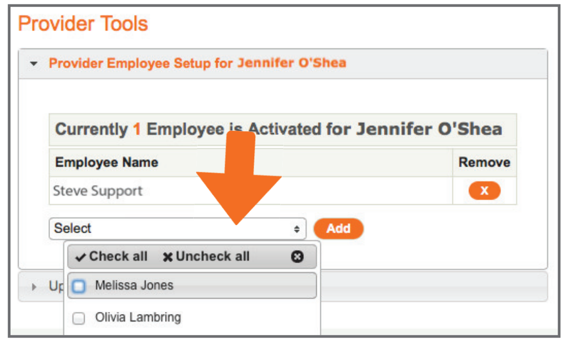
To assign authorized users (employees) within your organization to a specific waiver participant, individuals with administrative-level permission can do so in three easy steps:

1. Select the waiver participant for whom you wish to attach an employee from the Choose an Individual dropdown list of My Individuals area, then click on Individual's Profile.
2. Within the Provider Tools area of the 'Individual's Profile' view, click on Provider Employee Setup for [Waiver Participant Name]. This provides a view of employees currently 'attached' to this waiver participant's information. Upon logging in to Advocare, these employees are able to view any information related to that waiver participant.
3. To add an employee, click the Select dropdown to show the list of active employees. (An employee must have the 'This person is certified to work with individuals' permission role as part of their profile to be displayed here.) Select the employee name; click Add. Multiple employees can be selected at one time, or click 'Check all' to select and add all of the employees listed to the selected waiver participant.

   Please note: Access to the waiver participant's information is immediate upon clicking 'Add'.
4. To remove access to a waiver participant's information for a specific employee, simply click the orange "X" button in the 'Remove' column on the 'Provider Employee Setup' area.

   Please note: Access to the waiver participant's information is immediately removed upon clicking the orange "X" button.





❑ *Information Available to Providers*

Authorized users/employees listed in the 'Provider Employee Setup' area will be able to view the following information as related to the specific waiver participant selected in the 'Choose an Individual' dropdown in the 'My Individuals' area.

Individual's Profile: Based on information entered by the case manager and other shareholders, the 'Individual's Profile' area provides access, via a series of Advocare "window shades," to the following sets of information for the selected individual waiver participant.

CMCO/Case Manager: Lists the current case management organization and respective case manager supporting the individual, and related contact information.

Personal Information: Name, HIPAA name, county of residence, date of birth, and other identifying facts.

Waiver Information: Waiver type, status, and start and end dates.

Algo/Allocation Information: In addition to algo and allocation information, this area reflects the individual's raw health score and associated tier.

Diagnosis Information: Reflects primary, secondary, and tertiary diagnoses.

Relationships: Reflects the name, role/relationship, contact info and type for each person.

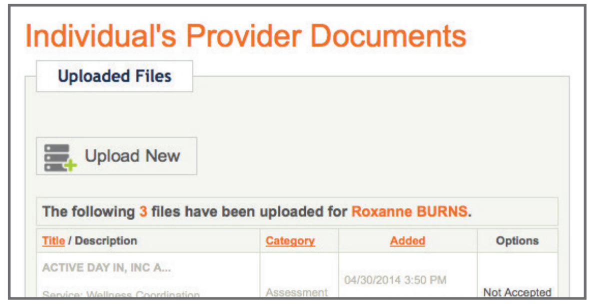
Individual's Address/Contact Information

Demographic Information: Gender, legal and marital status, and race are among the points reflected here.

Living Arrangement: Information includes the household size, number of housemates, and living arrangement.

Provider Documents: Participating providers can view and upload several specific types of documents for each waiver participant they support in the 'Provider Documents' area. These document types are as follows:

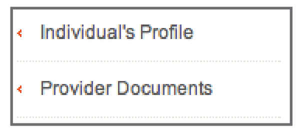
- Assessment
- Behavioral Management
- PCP
- Provider Quarterly Report
- Risk Mitigation Tool
- Risk Protocol/Plans
- Therapies
- Wellness Coordination Plan
- Wellness Coordination Support Docs



Only provider employees with the proper permission can use this area to upload Wellness Coordination documentation, including plans and supporting documentation. (The assessment is completed within Advocare.)

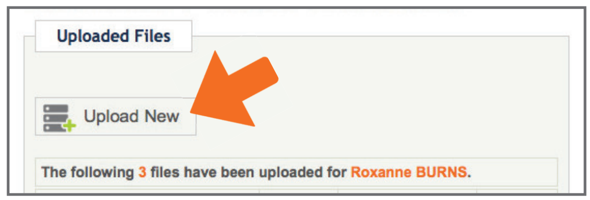
To upload a document for an individual:

1. Select the individual's name from the My Individuals dropdown, then click Provider Documents. Here you will see a list of documents already uploaded and accepted by the individual's case manager.

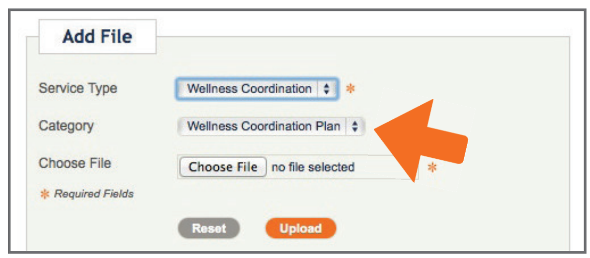


2. Click Upload New. Here you'll select a Service Type and Category before choosing the file to upload.

   Note: Documents should be reflective of the 'Service Type' and 'Category' selected. Documents unrelated to the 'Service Type' and 'Category' may not be accepted by the case manager. Do not use 'Provider Documents' to upload documents that are not a match to the 'Service Type' and 'Category' options provided.



3. Select Choose File to locate the file from your hard drive, then click Upload. The document will be displayed in the list when uploading is complete.

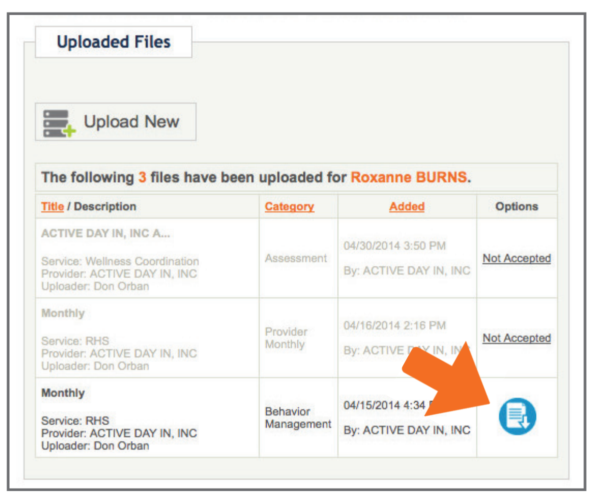


If a document is uploaded erroneously, please contact the case manager to have the document deleted, then re-upload the appropriate documentation.

To view existing documents for an individual:

1. From the list displayed in the 'Provider Documents' area, locate the document you wish to view, then click the blue download button (located to the right of the document's name) to download a copy of the selected document. Upon review and confirmation of the message pop-up, a copy of the document selected will be downloaded to your computer. Refer to your system's documentation for location and support regarding downloads.

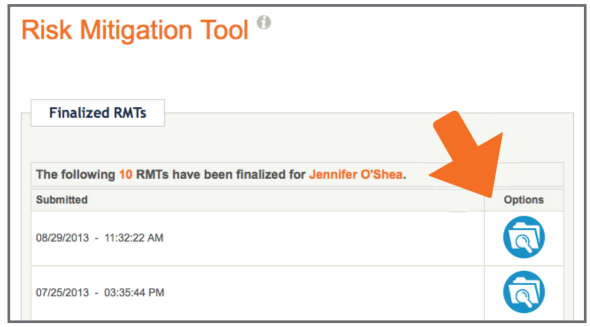
   Note: Care should be taken to protect and/or delete downloaded documentation when finished. *You assume responsibility for all documents that reside beyond the security provisions of uAdvocare.com.*



Risk Mitigation Tool: The Risk Mitigation Tool provides a list of RMTs finalized for the individual selected.

To review a specific RMT for the individual selected via the 'My Individuals' dropdown, click on the blue document button in the Options column. RMTs are available as "view only," meaning providers cannot modify the selected RMT. Information saved within the selected finalized RMT is displayed via a series of Advocare "accordions" or "window shades". For individuals not currently receiving Wellness Coordination as a service (based on their current CCB), the following RMT areas for the selected individual waiver participant are shown:

- Communication
- Behavior
- Adaptations/Therapeutic Interventions
- Independent Living/Self-Care
- Psychosocial
- Medical/Health
- Environmental Safety
- Self-Direction



For individuals currently receiving Wellness Coordination as a service (based on their current CCB), the same set of sections is available, but additions may be made by the Wellness Coordination service provider to the 'Medical Health' section throughout the CCB quarter, via the Wellness Assessment.

Each accordion header lists not only the RMT section reflected by clicking, but also the number of selections active within that section (shown in orange). This streamlines the process to determine which areas of the RMT are applicable for the individual whose records you are viewing.

For more information on completing the Wellness Assessment, view the PDF Guide, "Wellness Assessment for Providers", available in the 'Learning Resources' area of the Training Catalog.

To print a copy of a finalized RMT, click on the blue document button in the Options column for the selected RMT, then click the Print button. A printable version appears, which can be printed to your local printer.

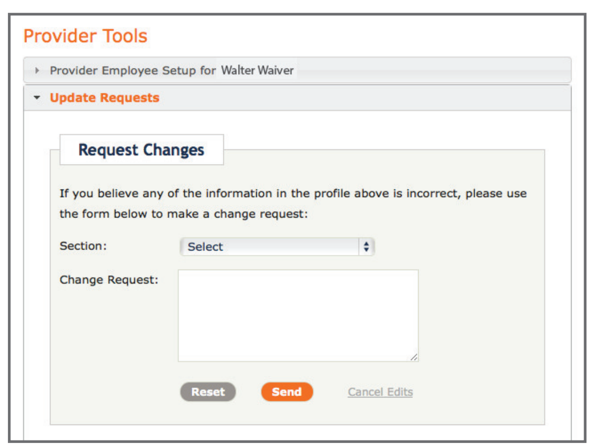
Note: Care should be taken to protect and/or delete downloaded documentation when finished. *You assume responsibility for all documents that reside beyond the security provisions of uAdvocare.com*.

To print a blank copy of the RMT, click on the Print Blank RMT link at the top left of RMT screen. A printable blank version will open in a new browser window, which can be printed to your local printer.

❑ *Requesting Updates to a Waiver Participant's Information*

Providers accessing Advocare can communicate directly with case managers regarding particular information related to a single waiver participant. The only area that incorporate a Make Request option is the **Individual's Profile**, located in the "My Individuals area of Advocare.

Individual's Profile: In order to make a request for changes to information within the 'Individual's Profile' area for a specific waiver participant, select the individual's name from the 'My Individuals' dropdown, click 'Individual's Profile', then follow these simple steps:



1. Click Update Requests, located in the Provider Tools area, then click the orange Make Request button.
2. Select the item from the Section dropdown that is related to area of 'Individual's Profile' for which you are requesting changes.

3. In the Change Request box, detail the requested change, then click Send. Your request is sent directly to the case manager currently supporting the selected waiver participant.

The requested change is now displayed in the 'Update Requests' section of the 'Provider Tools' area. When the case manager has made the change, the status of the request will be changed to 'Closed'. If you should decide to remove the change before it is closed, click the orange "X" button in the 'Remove' column. This action removes the item from both your view and that of the case manager.

Should the case manager needs additional details to complete the change, he or she may respond to your request via the request you submitted. Any comments or questions from the case manager will be displayed in the same area as the request, and may be responded to by the submitter upon receipt.

STILL HAVE QUESTIONS?

We're here to help!

Contact Advocare at
support@uadvocare.com